



Increasing Wellbeing and Trust in Higher Education During a Year of Change

Global Higher Education Research Snapshot



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Increasing Wellbeing and Trust in Higher Education During a Year of Change: Global Higher Education Research Snapshot, is based on a survey commissioned by Salesforce.org and conducted by Ipsos. This report was written by Michael Anft, with contributions from Karin Fischer and Janet Ilieva.



Executive Summary

COVID-19 has forced universities worldwide to make sweeping changes in operations. At the same time, students and campus employees have had to make considerable adjustments of their own.

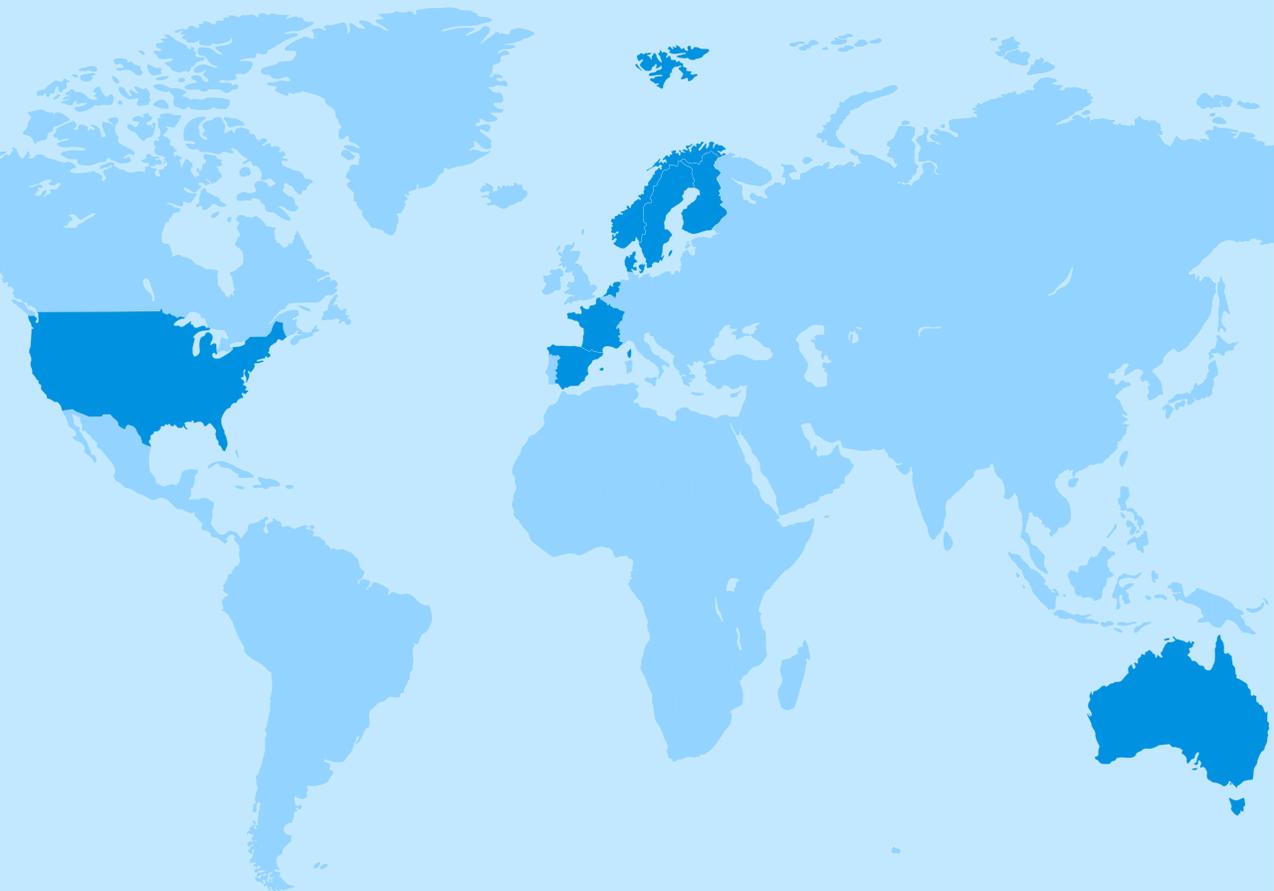
Data in the globe-spanning Global Higher Education Research Snapshot, gathered from a survey of higher-ed students and staff around the world, reflects this new reality. More than half of students worldwide report that the pandemic has changed their education plans, with significant numbers saying they will postpone their education (28 percent) or take longer to earn a degree (32 percent). The COVID-19 era has also increased the numbers of students who say they expect to learn differently or will require more financial aid.

The nature of higher education has been transformed through the necessary switch to digital tools and platforms. More institutions run exclusively virtually, offering a wider array of online courses to make up for the lack of

face-to-face classes. Students who enrolled this Fall anticipated that 40 percent of their classes would be online overall, with the number of expected on-campus classes dropping by around half from what students anticipated last year in Australia, the United Kingdom, and the United States. Among nations whose students took part in the survey, only a majority in France, at 51 percent, estimated that they would experience more than half of their learning face-to-face.

More than half of university employees (52 percent) believe that students can benefit as much from online learning as they can from entering a classroom. But a gap exists between their views and those of students. A significantly higher number of degree-seekers worldwide (43 percent) believe they can learn as well online than those who say they cannot (32 percent), with students in the United States (48 percent) and Australia (47 percent) agreeing more often that they learn just as well online as they do via in-person classes.

Students globally believe that they are more connected to their institutions than last year—a tribute, perhaps, to efforts by many universities to engage students during the pandemic via digital tools.



While nearly one-quarter of all students expected to experience a mix of on-campus and remote classes, a combination known as “hybrid learning,” a considerably higher number of students—46 percent—say they would prefer hybrid arrangements more than they would a purely online or in-class experience.

A higher percentage of students globally believe that they are more connected to their institutions than last year—a tribute, perhaps, to efforts by many universities to engage students during the pandemic via digital tools. Only students in the four Nordic countries in the survey reported feeling less connected than last year. With the exception of the Netherlands and the Nordic countries, students reported more interactions with both instructors and staff this year than last. Three in four students said they would like to receive pandemic-related communications at least weekly.

Students identified their own wellbeing as a major issue, something reflected in their financial concerns. More than twice as many students internationally (39 percent) say they will require more financial aid to attend university this year than those who say they will need less (17 percent). One in five students say they are changing universities to take advantage of a more affordable option.

At the same time, the survey shows a widening gap in trust between students and their institutions. With the exception of students

in the Nordic nations, students say that the COVID-19 pandemic has caused them to lose some trust in their institutions.

University staff members say that maintaining contact with students is a priority during the pandemic. More than half of staffers across all countries agree that their college responded effectively to the pandemic, while only around half of students agreed. Of those students enrolling in a different university from a year ago, 25 percent said they were doing so because they disapprove of the way their previous university has handled the pandemic. Nearly one in three students said their university could have improved their pandemic response with more transparent decision-making, or by communicating with students more often (27 percent).

The survey was commissioned by Salesforce.org and conducted online by Ipsos, from August 10 to September 9, 2020 with 1,125 student respondents and 1,075 staff (2,200 total respondents). All respondents are age 18 or older and are enrolled full-time or part-time in a variety of two- and four-year private and public colleges of several sizes.

The United States, Australia, Denmark, Finland, France, the Netherlands, Norway, Spain, Sweden, and the United Kingdom are the nations represented in the survey. Roughly half of student respondents—52 percent—identified as female. Nearly one quarter of staff represented in the data were faculty members.



Introduction

Students around the world are spending more time learning from home during an epochal pandemic. Universities are working harder to upgrade their remote- education systems and maintain close contact with distanced students, who are expecting more help reaching their career goals at a time when the financial value of a university degree is being questioned more than ever.

At the same time, institutions in some countries, including Australia, that have relied on international students to bolster enrollment, are faced with the challenge of closed borders and travel bans.

For all these reasons, survey results in this Global Higher Education Research Snapshot reflect a changing, fractious, and uncertain time.

The findings document longstanding student worries regarding future success in the job world. But they also outline emerging areas

of student concern—ones that might deserve more of an institution's attention. Even though universities have long focused on academics as a way to make themselves stand out, the survey report indicates that other considerations, such as student wellbeing and the availability of flexible learning options, rival academic quality as key issues for students.

Students now place a higher value on being connected with each other, their institutions, and their professors during the pandemic.

At the same time that students want institutions to adjust to the times and their changing needs, they also report a declining level of trust. During the pandemic, many universities closed their campuses and focused on delivering more online courses. Yet, while doing so, many have not offered students any kind of break on their tuition and fees.

Some institutions in the United States have held students to on-site leases or residential agreements even after they shut down campuses. And others have opened up for classroom

The consistency across nations in many survey responses shows that students around the world are facing many of the same issues.

education only to suffer high numbers of infections, eroding student trust further.

Across Europe, too, university campuses became coronavirus hotspots. At U.K. institutions that have reported COVID-19 outbreaks, administrators have asked students to go into voluntary lockdown. Norwegian officials appealed to partying students to observe social distancing lest they spark a resurgence.

Student concern about health and safety is matched by anxiety about job prospects, mirroring events in the United States, where, the U.S. Census Bureau reports, nearly 4 in 10 American families have suffered pandemic-related job losses. With the economic outlook murky and with 72 percent of students globally saying they have financial concerns, students are looking for more help from universities with job preparation. More than twice as many respondents report needing more financial aid this year than those who say they will require less of it.

Even though they may be lacking in trust, the survey echoes other studies showing that students now more highly value being connected with each other, their institutions, and their

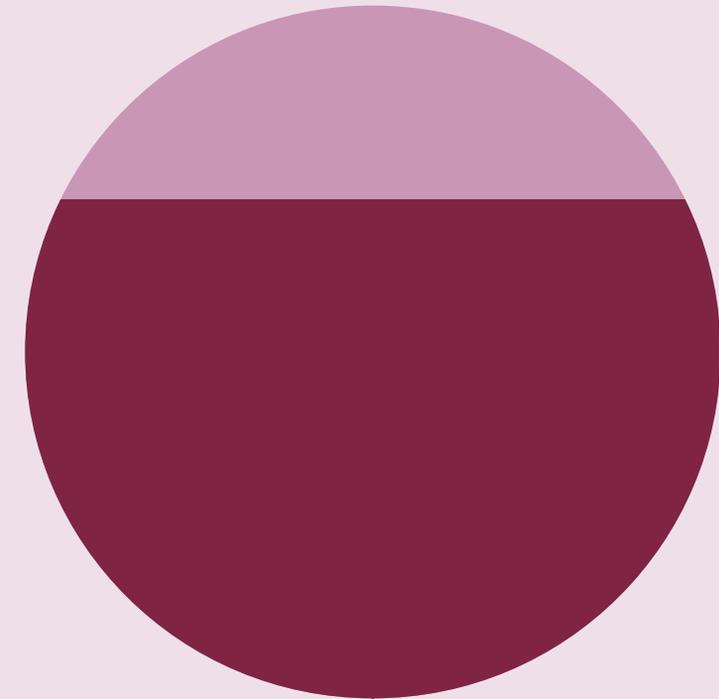
professors during the pandemic—something that university employees agree with.

Students report desiring more flexible learning options, with nearly half of them preferring more hybrid education to strictly online or in-person learning. Staff members report that more institutions are moving ahead on virtual learning, with 60 percent saying their campuses are investing more in online-learning options.

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“It was very interesting that the cross-national aspect shows so much commonality,” says Daniel Eisenberg, professor of health policy and management at UCLA. “Even though the timing of COVID-19 has been different, the pandemic has been extremely disruptive in every country. The data reflect that commonality in experience.”

In the chapters below, we’ll mine the survey for trends, explore one-by-one the issues raised by its respondents, and examine what they mean for institutions.



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Keeping Connected

Even during these times, when many campuses are empty and classrooms are often conducted via videoconferencing, a higher percentage of students around the world say they feel more connected to advisors (31 percent), faculty members (32 percent), and other students (34 percent) than those who say they feel less connected (21, 20, and 25 percent, respectively).

The importance of such connections can't be overstated. Students, in a considerable number of instances, have been physically barred from attending their institutions. "I don't think many students think of themselves as being part of a college ecosystem right now," says Bryan Alexander, a senior scholar at Georgetown University.

A university's communications mission now is to find ways to consistently keep its students informed and engaged with a campus community it can't feel, see, or touch.

Maintaining connections with faculty members is especially important to students in remote-learning environments, according to a recent [study](#) from Rutgers University.

In this regard, the research results are encouraging: More students this year than last anticipate having more interaction with their instructors.

A [recent study](#) by the International Association of Universities found that 91 percent of all universities worldwide have such communications infrastructures in place and are using them more to reach students remotely during the pandemic. And the IAU survey results indicate that institutions have put their email servers, learning management systems, websites, and other communications tools to good use during the COVID-19 era.

Still, communications remain a challenge for institutions. This may in part be because students are demanding more connectivity. A significant number of students report relying on online communities to help them prepare for the academic year (32 percent), make them feel more connected to other students (30 percent), or their instructors (29 percent), and make them feel like they belonged at their university (28 percent). Many say their institution can improve their pandemic response by using more frequent communications (27 percent).

Institutions that expand their communications in the future by opening up two-way lines, via tools such as online communities, will better fill students' growing need to connect with them.

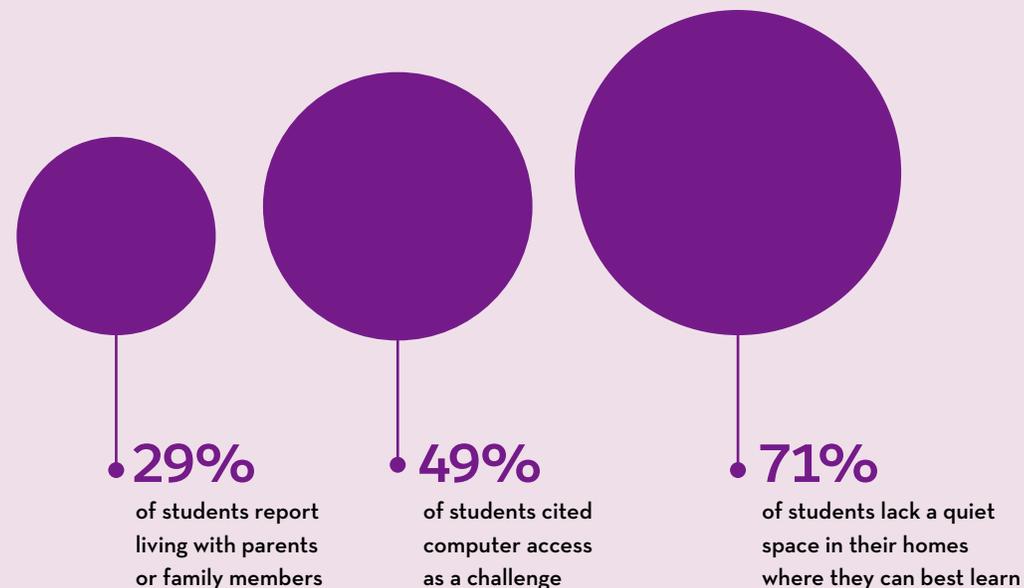
Seventy-seven percent of students report that receiving personalized messages would help them feel that their school cares about their success, a critical element especially during these times where many students are learning virtually. Connecting with students on their preferred channels is also key. The chairman of the board of Fontys University of Applied Science in the Netherlands, for example, has posted to Instagram a couple of times a day since the beginning of the pandemic, inviting students to ask questions or share their concerns with him directly and informally.

"The more colleges work to communicate with students, the more students feel trust with them," says Robert Kelchen, associate professor of higher education at Seton Hall University. "I'd expect most students to receive communications—college is a major investment for them. Universities need to allow students and staff to speak, and not just be communicated to. At the very least, colleges need to solicit regular feedback. There are too few ways for them to see all the questions that people might have."

Though many institutions also feature COVID-19 "dashboards" on their websites, they may not be effective, or contain outdated information, experts say. Some institutions may update their counts of infected students weekly or irregularly. Students tend to want more up-to-date information delivered via text messaging, Alexander says, as well as reports on flexible office hours and advising opportunities.

The inability for some students to finish academic work during the pandemic might also be linked to access challenges and finding a supportive learning environment. Nearly three in 10 students report living with parents or family members. A majority of them (71 percent) say they lack a quiet space in their homes where they can best learn and nearly half of students cited computer access as a challenge.

"Colleges might create more opportunities for students to connect with them, but that doesn't always mean that they can," says Alexander. "If you have broadband issues, it may be that only one person in the house can use it effectively at any one time, which will affect how well someone learns."



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Reaching Academic and Career Goals

Even before the current crisis, the concept of educational return on investment had become a rallying point for students, parents, and observers demanding more from a degree—and from universities. Getting an education that confers marketable skills and a chance at a good-paying job in the longer term is now a standard of success for more and more students.

Now, with the added effects of the pandemic and an uncertain economic future, students are more likely to align their academic and career goals in the hope that they can land fruitful and meaningful work once they graduate. The Australian government, in fact, recently announced changes to tuition fees to make it less expensive for students to pursue degrees in high-demand fields like teaching, nursing, and engineering.

The survey findings show that students largely agree that their university is helping them achieve their academic goals (81 percent) and career goals (78 percent), and that they have a sense of belonging at their university

(79 percent). Students in Australia, the U.K., and the U.S. are more likely than students in other countries to say their university is helping them attain their career goals (86, 83, and 85 percent, respectively). Students in France, who feel less safe and less connected than students from other countries, report the lowest sense of belonging (68 percent).

University experience and individual economic outcomes remain major concerns for students. The pandemic has forced students to think deeply about how a postsecondary degree can support their career aspirations. A majority of students (60 percent) surveyed worry about finding employment after graduation, with France (70 percent) and Spain (77 percent) reporting the highest levels of concern.

Students who also work may already be facing financial pressures. Over twice as many students overall (39 percent) are requiring more financial aid since last year. This may reflect a reduction in the number of jobs due to lockdowns during the pandemic.

Weakened economies and their effects on labor markets create anxiety for college students. University measures to increase student employability gain in importance during these times, experts say. In the survey, 40 percent of students say that finding a university that offers more help in finding an internship or a job is a key consideration in how they choose an institution. And more than half of students say it is important to have the chance to attend job fairs and networking events through their university.

“The pressure of careers, of getting a quality education, and of growing financial debt weighs on European students, from undergrad to doctoral students,” says Hans de Wit, director of the Center for International Higher Education at Boston College. “COVID-19 has made them more anxious because they don’t have that student community to rely on. They can no longer carry out plans for these new lives they’ve envisioned.”

Gilles Bousquet, a professor of French at the University of Wisconsin at Madison and an expert in comparative and international education, called employability “probably the number one issue right now” for French higher education because of the dual impact of the pandemic and the weak economy. With students lacking access to internships and the usual pathways to jobs, the French government has elevated youth employment as a key policy priority, he says.



There is evidence that COVID-19 is having an effect on how students pursue academic and career goals, above and beyond the longer-standing concerns about the payoff of an investment in a university education. Slightly more than half of students overall claim that the pandemic has forced them to change their academic plans, with students in the United States (58 percent) reporting at the highest level.

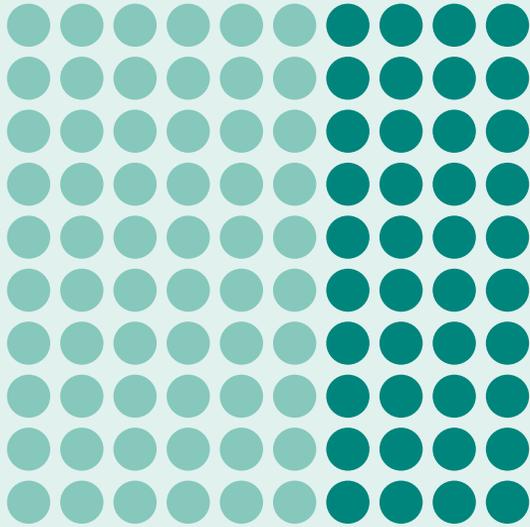
A majority—six in 10—of those who say they have altered their pursuit of a degree report they will increase the time they will take to earn it or are considering postponing their education.

There are risks to these approaches, experts say. Outside studies conducted before

the pandemic have shown that American students who take even one year off of university lower their chances of graduating by 50 percent.

“For American students, there’s a lot of inequality in the figures,” says Anthony Carnevale, director of the Center on Education and the Workforce, at Georgetown University. During an economic recession one of the best things people can do to improve their situations in the long term is attend university. But COVID-19 has wiped out entire classes of jobs worldwide and has hit poor students of color in the United States particularly hard. “The scarring from this will be significant and long-lasting for them,” Carnevale adds.

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Simon Marginson, director of the Centre for Global Higher Education and a professor at the University of Oxford, notes that early enrollment figures in Fall 2020 in both the United States and the United Kingdom suggest that, despite their assertions otherwise, most students have continued with their studies. In the current economy, they have few options for work, even on a part-time basis, he says. “It doesn’t make sense to leave university during a recession.”

But socioeconomic class plays a role in which colleges can get the corporate support or interest for both job-training opportunities and information sessions, Carnevale says. As a result, access to many of these career-focused activities are limited. For the companies that underwrite apprenticeships or internships, focusing on helping students at an Ivy League or Oxbridge college may seem like good business. But that hardly does anything to lessen inequality for students closer to the bottom of the ladder than the top.

“Wealthy institutions have a leg up there,” says Carnevale. “Companies all want to say that they have Ivy League grads, and are more likely to work to have a presence at those kinds of institutions.” Overall, he adds,

corporations are much less likely to support apprenticeship or internships programs—something that has kept them from growing to meet student demand.

By some measures, colleges may also be falling short when it comes to linking students with opportunities to advance their career goals, especially in today’s virtual world. Only 19 percent of students say their institution offers students an online community through which to connect with alumni, while only 18 percent offer online career and job resources.

While the majority of students report that they will stay at the universities where they are currently enrolled, one quarter say that if they did switch, it would be because of their institution’s handling of the pandemic. Another 25 percent say they would be likely to seek out a new institution that aligns better with their career goals, while 24 percent say they’d look for a university that is more likely to mirror their academic goals.

Meanwhile, 29 percent of university staff predict a likely uptick in adult learners also seeking economic returns on their college investment, in the form of reskilling or upskilling opportunities. Of those staff respondents, 61

percent say the number of adult learners will increase because people will want to switch careers or intensify their skills to help them get through the COVID-19 era and its aftermath.

The current economic uncertainty is impacting university staffers as well. They report concern about the financial stability of their institutions regarding budget cuts (51 percent), the cancellation of events (40 percent), and a decrease in international students (40 percent).

More than half the staff surveyed in Spain, the United Kingdom, and the United States report concerns about budget cuts (51 percent, 56 percent, and 61 percent, respectively), whereas Australian staffers report more worry about a decrease in international students (51 percent) than staffers in other countries. The latter also represents a significant worry for staff in the U.K. and Spain (42 percent each). Home-country subsidies that come with international students often help support research efforts in some nations, including Australia and the United Kingdom, that receive those students. The prospective loss of those subsidies could have a negative effect on the finances of postgraduate-level STEM programs and business and management programs, experts say.



A Matter of Trust

Along with ongoing questions about the cost and the value of a university education, concerns about fairness have grown as COVID-19 has created new challenges for institutions. While institutions in some countries have long faced scrutiny from lawmakers and the public, universities now must confront many students' notions that their best interests may not be taken to heart.

In some European nations, a drive toward making universities run more like businesses has created a tough dynamic—one that has been amplified by COVID-19. Previous and current budget slashing is now taking its toll on some students. In the U.K., cuts in grants to universities are being targeted by some as the reason for the on-campus quarantining of thousands of students. Controversy over the changes in how the U.K.'s universities grade A-level exams has contributed to a decline in trust among students, experts say.

“Even before COVID, there was a considerable amount of concern in continental Europe and the U.K. about the neoliberal approach to education, which includes the weakening of tenure, lesser public support, and the courting of more international students,” says de Wit.

Elsewhere, as institutions have moved to expand their remote course offerings, many students believe they are entitled to a discount in tuition and fees. They reason that without on-campus experiences and classes, they are paying the same price for fewer services. Yet, only a few universities have offered discounts. After skyrocketing coronavirus cases prompted campus lockdowns, universities in the U.K. offered students a two-week rent rebate.

Students and their families have filed lawsuits against some colleges, asking that a portion of their tuition or housing fees be returned. In Britain, an independent university regulator ruled that higher education institutions must consider refunds.

The survey gives some hints of student living situations around the globe and how they may leave some students more vulnerable to contracting COVID-19. Results show that students in the U.K. and the Netherlands are the most likely to live on campus (40 percent and 30 percent, respectively). A significant number live with classmates or friends (29 percent in the U.K. and 26 percent in the Netherlands). Both numbers were considerably smaller in the Nordic countries and in Spain.

Institutions that once promised more in-person or hybrid classes were forced to pivot toward online learning last Spring when the pandemic hit hard, leaving some students feeling like they'd been baited-and-switched.

Meanwhile, some institutions opened their campuses in the Summer or Fall to dire consequences, with hundreds of students becoming infected with the virus. Some institutions in the U.K. were forced to suspend in-person teaching and go online.

All of these examples are contributing to a widening gap in trust between learners and leaders. Though they remain confident in their university's leadership, a considerable number of students (40 percent) cite a trust gap between them and leaders, and nearly half (48 percent) of those who cited a gap say that the pandemic caused the gap to grow larger. That gap was widest among students in Spain—46 percent.

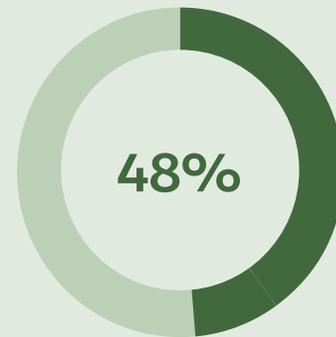
Over all, four in 10 students believe a gap in trust exists between faculty and college leaders—almost identical to the number of college employees (41 percent) who report seeing such a gap.

“The big piece here is that trust in higher education is fading quickly—and among various groups,” says Kelchen, at Seton Hall. “It’s not just the public distrusting higher ed, but students, faculty, and leadership distrusting each other.”

The higher numbers of employees who distrust university leadership is reflective of the years'-worth of experience most of them have had with various presidents, provosts, and deans. “Among faculty and staff, there’s



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more skepticism about what a particular leader might do,” Kelchen adds.

He adds that university presidents are often in a bind when it comes to closing down their campuses. Many run government-backed institutions in countries or states where the government is loath to close them during the pandemic. In the United Kingdom, the lack of any emergency government subsidy led almost all universities to reopen to face-to-face classes, Marginson says. “It forced them to behave normally in very abnormal times.” With residence halls full, outbreaks occurred in at least 85 British universities.

In western European countries, there is deeper public and government support for universities, which may have isolated them from some of the political pressures that have been felt by universities in the U.S. and U.K. during the pandemic. Nonetheless, universities across Spain opened for in-person classes in the Fall, despite a growing number of coronavirus cases. In France, officials hoped mandatory mask wearing would reduce the risk of transmission, but universities pivoted online just weeks after resuming classes after coronavirus clusters exploded on campuses throughout the country. “They call it the stop-and-go strategy,” Bousquet says, “but really, it’s better to call it go and stop.”

Keeping those institutions open despite climbing infection rates may be affecting students’ levels of trust. Three in 10 students said universities could have improved their pandemic response by being more transparent. Marginson says that one legacy of the pandemic could be a cohort

of students who are more skeptical about their universities and less inclined to accept the messages from administrators at face value.

Over all, three in 10 students do not feel prepared or feel safe about returning to campus, with French students (38 percent) and Spanish students (40 percent) reporting they do not feel safe.

Though a majority of students believe institutions could have done better in some ways, half of the students surveyed say that their institution has dealt effectively with the pandemic. There was a wide range of opinion, from Spain (31 percent) to Australia (61 percent). Employees in Australia (74 percent) and the United States (75 percent) report that their institutions have effectively dealt with the pandemic.

Still, 75 percent of students overall say they would like to receive pandemic-related communications from their university more often, while some students believe that institutions should exhibit more transparent decision-making about the pandemic (30 percent). An institution’s pandemic response was cited as a major reason among non-returning students for why they chose not to enroll this Fall.

Some international education experts found the overall results regarding student trust surprising. “It’s possible, since the survey was taken in between the two waves of the virus, that we’d see higher negative ratings if it were taken now, when many campuses around the world are closing for the Fall and possibly for the Spring semester as well,” says de Wit.



Student Wellbeing

Though the emotional, mental, and physical health of students has been a growing concern in recent years, the COVID-19 pandemic has transformed wellbeing into a defining facet of their university experience.

A strong majority of students (73 percent) see maintaining their wellbeing as a paramount concern, followed closely by financial worries (72 percent). These categories were ranked as the most pressing challenges, and above 12 other possible responses. Learning online also remains difficult: in fact, adjusting to taking courses and exams online were two answers checked off by 70 percent of students globally as challenges. Australian (81 percent) and Nordic students (80 percent) especially emphasized the primacy of wellbeing.

Not surprisingly, significant numbers of students seek more effective responses to the pandemic from their universities. Nearly one in three students (32 percent) say that their institution could improve its COVID-19 response by providing students with more resources and support for

wellbeing and mental health. Around 20 percent cited PPE and COVID-19 testing as resources they wish to see more often.

“The results speak to the anxiety and uncertainty students expect in the coming months,” says Eisenberg of UCLA. Another data point showing that three in four students prefer to hear news about the pandemic from their institutions at least weekly points up how rare the current situation is for safety-conscious students. “I doubt they’d be interested in hearing from the college weekly on any other matter,” Eisenberg adds.

For the past several years, American students have sought more mental-health services—sometimes more than institutions have been able to provide. Eisenberg helped conduct a [survey](#) earlier this year for the Healthy Minds Network and the American College Health Association (ACHA) and found that depression among students increased in the Spring, after the pandemic commenced. A higher proportion of students said their mental health has had

a deleterious effect on their academic work. What's more, 60 percent of students found it even more difficult to get mental-health care during the pandemic than before.

The world's precarious financial state and the loss of jobs has had its effect on students and their sense of wellness, as both the Salesforce.org survey findings and the ACHA study show. In the latter, two-thirds of students said their finances were creating more stress. In the former, one in five students announced they are switching to a more affordable university.

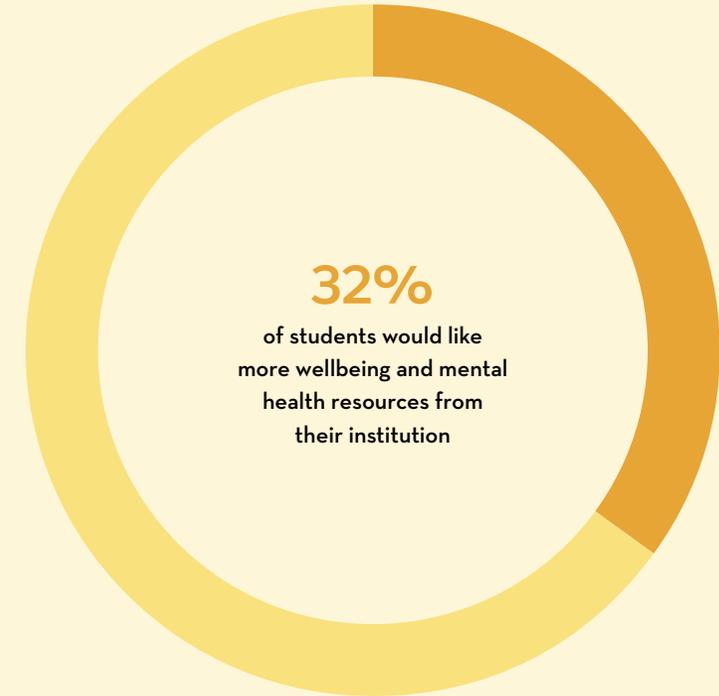
Nearly four in ten students report needing more financial aid this year than last. "The fact that the percentage of those who say they will need less money is as high as it is [17 percent] was surprising to me," says Alex Usher, president of Higher Education Strategy Associates, a Toronto-based consulting and research firm that works for higher-ed clients around the world. "Those who say they need less aid may

represent the first wave of people who are paying less because they are studying from home rather than paying for on-campus housing, as we're seeing in the U.K. and elsewhere. Such students might also be saving themselves the cost of traveling between home and campus."

Some higher education employees also report wellness concerns, with 24 percent saying they don't feel safe returning to campus in the Fall. Still, 65 percent of university staffers overall say that their institution has responded effectively to the pandemic—15 percentage points higher than students.

Ironically, students' concern about wellbeing might represent a semblance of health, or at least a heightened regard for taking care of themselves. "The fact that maintaining wellbeing is the top response tells us a lot," Eisenberg says. "It's a positive, in a way. Students today are attuned to this challenge in a way that previous students might not have been."

Numerous studies show that the world's precarious financial state and the loss of jobs has had its effect on students and their sense of wellness.





Flexible Learning Options

Though higher education has been gravitating toward new tech and new teaching methods in recent years, COVID-19 kicked such efforts into high gear. Many student respondents say universities should take a step further by making learning more flexible as the pandemic rolls on.

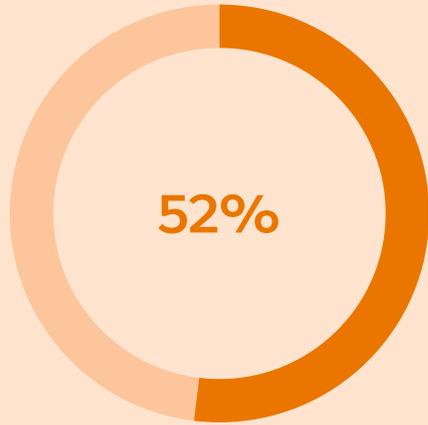
Besides the switch to remote education, significant numbers of survey respondents say that institutions can best improve their pandemic response by infusing flexibility into grading practices and course assignments (35 percent) and academic options (33 percent). A subgroup of students (27 percent) expects universities to allow more course-scheduling flexibility and more online advising (26 percent). Some also noted the value of having more online options (31 percent) and more online communities where they could connect with faculty and staff (30 percent).

More than half of students overall expect more online courses in the coming year, with Spanish (70 percent) and British students (59 percent) reporting at the highest proportions among nations. Still, Marginson says he did not anticipate a significant long-term shift toward remote learning as long as students “perceive online education not as equal but as inferior.”

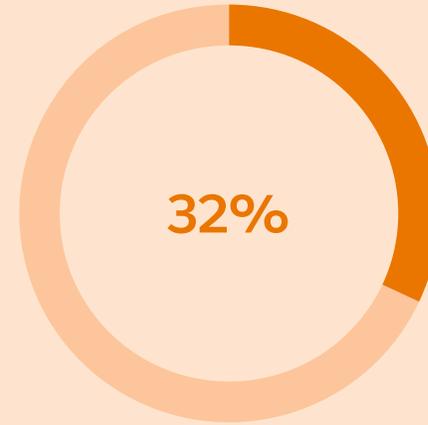
Nearly half of students overall say they would prefer hybrid arrangements more than a purely online or entirely in-class experience.

Some governments have begun to respond to the need for more options and flexibility. The European Union recently announced a \$100-million university grant program to support digital-education readiness and improve online and hybrid learning.

In terms of tech advancements, only one of 16 types of educational technology—videoconferencing—earned more than 50 percent of



of staff say online learning is as effective as on-campus learning



of students worldwide say they cannot learn as well online as in the classroom

responses from university employees who were asked to report which communications technologies have helped stabilize their institution. Students, meanwhile, rated only one type of technology—online class streaming—at 31 percent or higher as “helpful” to online learning. Universities may need to be more flexible in how they choose and use technologies, experts say.

The good news is that more than half of employees (57 percent) report that their institutions are investing more in flexible learning options; 60 percent say those options might draw in new students. But institutions might be challenged as

they look to ramp up those tech tools, as more than half of staffers say they worry about budget cuts.

Survey data also gives some encouraging news about student perceptions regarding learning flexibility. When Spring 2020 (along with the first wave of COVID-19) arrived, many universities locked down, and then took on a new challenge, turning on a dime toward online learning. In the southern hemisphere countries of Australia and New Zealand, coronavirus concerns mounted just as universities were returning from Summer vacation, and many began the

academic year online, only gradually shifting to more of a hybrid educational model. The low rate of negative survey responses from students overall shows that institutions generally have made a successful transition, says Usher.

Students seem to have taken on the challenge as well—but with some caveats. While some have warmed to online education, many others say they prefer it when combined with live classroom learning. Nearly half of students overall—46 percent—say they would prefer hybrid arrangements more than a purely online or entirely in-class experience.

Though the COVID-19 era has elicited many questions from students and parents regarding the efficacy and value of learning online, survey results show that 44 percent of students worldwide say they can learn as well online as they can in the classroom, compared with 32 percent who say they cannot. Students in the United States (48 percent) and Australia (47 percent) agreed more often that online learning is on a par with face-to-face learning, while those in France (36 percent) and the Nordic countries (39 percent) were more likely to say they could learn more in the classroom.

Staffers are more likely than students to say that online learning is as effective as on-campus learning (52 percent).

“What this tells us is that universities can use digital learning to supplement traditional types of learning,” says de Wit. “There’s an opportunity there going forward, if universities use online tools effectively during and after the COVID crisis.”

Conclusion

COVID-19 represents the beginning of a period of massive change within higher education, both in the United States, where a sharp and imminent drop in the numbers of recent high school graduates existentially threatens many institutions, and in nations such as Australia, which is reeling from a lack of access to international students. With a quarter of the total student population in Australia from overseas, the closure of international borders will result, at least temporarily, in an incredible financial blow; revenue losses could total as much as \$16 billion AUS, or about \$11.5 billion U.S., through 2023, higher-education groups have estimated. An ever-accelerating pace of technology development will also challenge colleges and students, who will also have to deal with the costs of attending university during a time of economic peril.

Based on the results of the research, institutions should continue to find ways to keep themselves in close contact with students—both for the duration of COVID-19 and beyond. Doing so can maintain or improve their students' wellbeing, clearly a top concern for them. The data suggest that institutions would do well to foster more connections by creating more online student communities, as well as more opportunities to speak directly, if remotely, with advisors, alumni, mental-health professionals and, of course, faculty. Such actions could maintain a sense of community until

closed campuses can re-open, while offering more ways for the campus community to connect once the pandemic is under control.

Though colleges will be tasked with making their operations more affordable and flexible, they need to make sure that they are transparent so that students can understand and trust the changes they are making.

They'll also need to take note that while students are becoming more used to online learning, and see it as part of the future, a significant number still place

high value on traditional, face-to-face learning, which they view as an integral facet of their education.

Though many institutions globally had previously made moves toward digital transformation, they recently made a wholesale turn toward online education in response to the pandemic, with student wellbeing a priority. In the future, higher ed institutions will learn how effectively they can teach online, as well as how well they can mix remote learning with in-person education.

Governments and universities worldwide have made massive investments in online platforms, while relaxing regulatory requirements. Those investments must be put to continued good use once the pandemic is under control. Whatever shape the future of higher education takes, it is likely to become even more flexible, inclusive, and student-centered, no matter the place from which students are studying.



Methodology

Sample

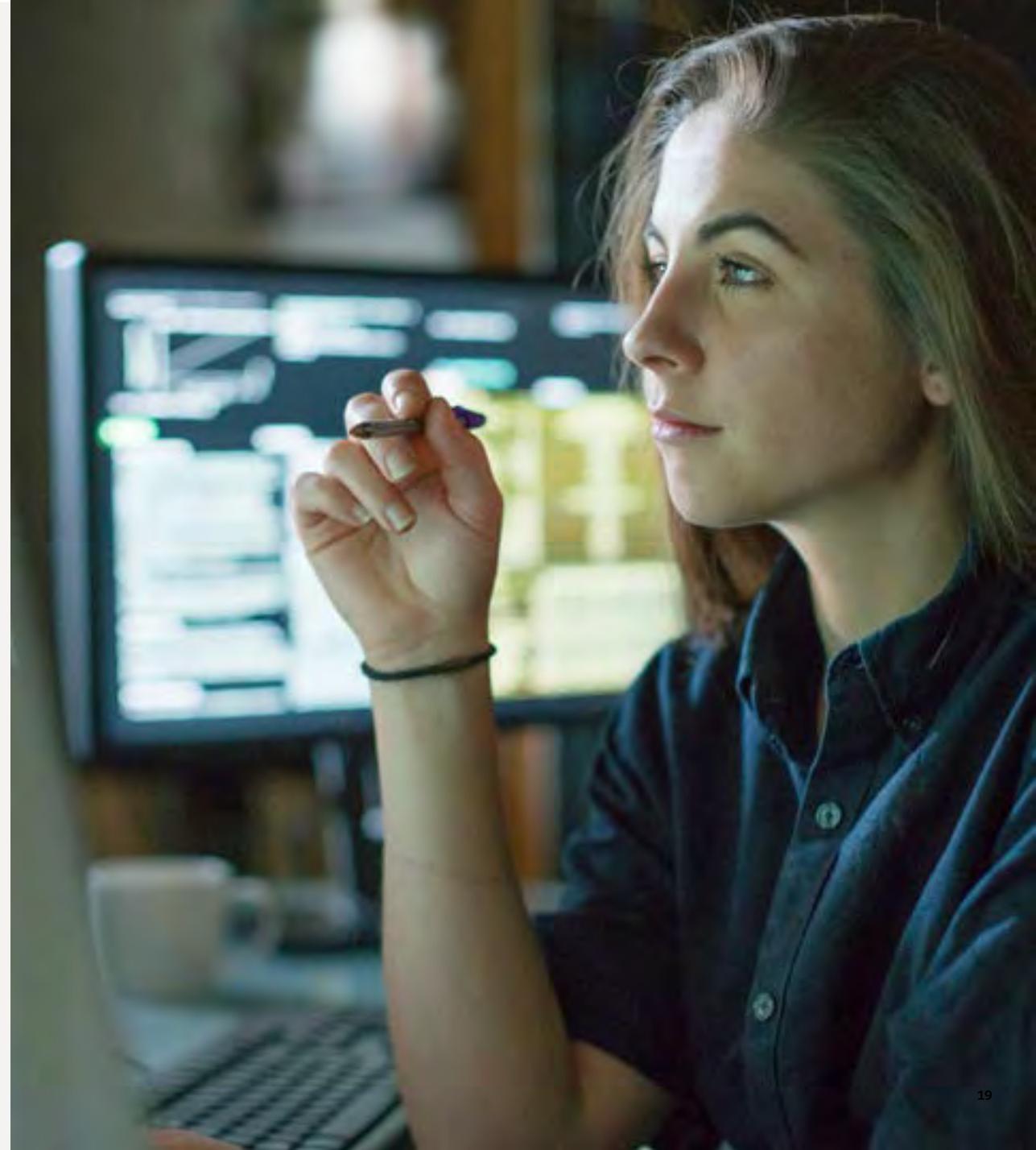
Qualified respondents were:

- **Students:** adults age 18-plus, who are full-time or part-time students enrolled in a higher-education institution
- **Staff:** adults age 18-plus, who are employed full-time or part-time at a higher- education institution (not including trade/vocational schools), and are in a faculty or management/leadership role

Data Collection

A total of n=2,200 interviews were collected from August 10, 2020 to September 9, 2020 via an online quantitative survey in 10 countries. The questionnaire was developed by Ipsos, in collaboration with Salesforce.org and The Chronicle of Higher Education. Programming logic/branching was included where appropriate depending on the audience. On average, it took 9 minutes to complete.

Country	Students	Staff
United States	175	175
United Kingdom	175	175
Netherlands	175	175
France	175	175
Spain	175	175
Australia	175	175
Norway	20	3
Denmark	15	10
Sweden	20	4
Finland	20	8
Total	1,125	1,075





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